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# TrueFiling™

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Law Firm  
Administration Guide  
1.0.71

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ImageSoft, Inc.

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## TrueFiling Law Firm Administrators

TrueFiling provides the ability for a law firm to share access to case information and filings for a firm using a single TrueFiling Law Firm Site. The TrueFiling Law Firm Site is created by a member of the firm usually denoted as a TrueFiling Law Firm Administrator.

### Administrator Overview

Unlike other e-filing systems, TrueFiling requires every member of the firm uses their email address to access the firm's TrueFiling Law Firm Site. Only a TrueFiling administrator can invite other users to join the firm's TrueFiling Law Firm Site. It is the responsibility of the firm's TrueFiling administrators to ensure that every user accessing the firm's TrueFiling Law Firm Site is using their own credentials and email address.

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NOTE: TrueFiling does not encourage the sharing of TrueFiling credentials to gain access to a firm's site. Every user accessing TrueFiling needs to be invited using their email address as the user name.

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TrueFiling supports multiple TrueFiling administrators for the same TrueFiling Law Firm Site. The initial TrueFiling administrator can promote any member of the firm to an administrator. Similarly, an administrator can demote any administrator back to a regular member. The last administrator cannot be demoted ensuring at least one TrueFiling administrator is available for every TrueFiling Law Firm Site.

### Administrator Duties

TrueFiling administrators are responsible for the following duties.

- Creating a TrueFiling Law Firm Site
- Managing Login Users
- Managing Favorite Courts
- Managing Payment Accounts

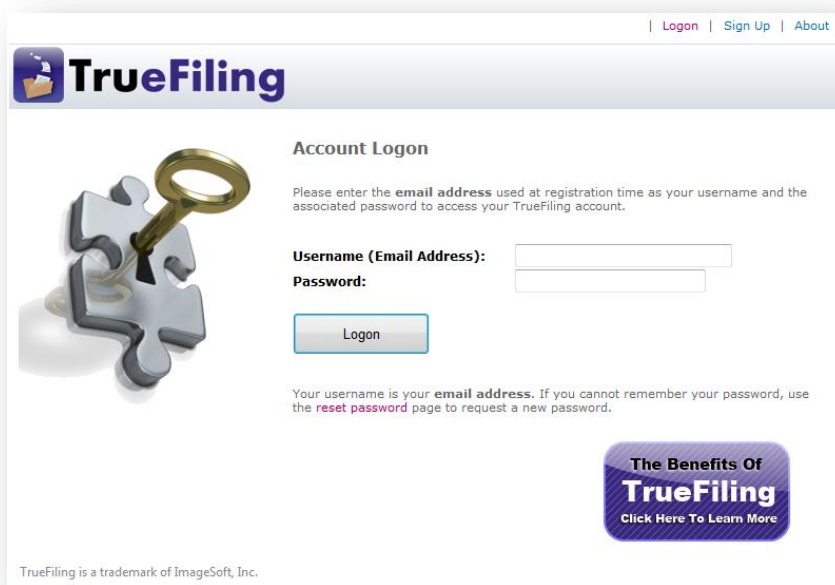
# Creating a TrueFiling Law Firm Site

## Searching for an Existing TrueFiling Law Firm Site

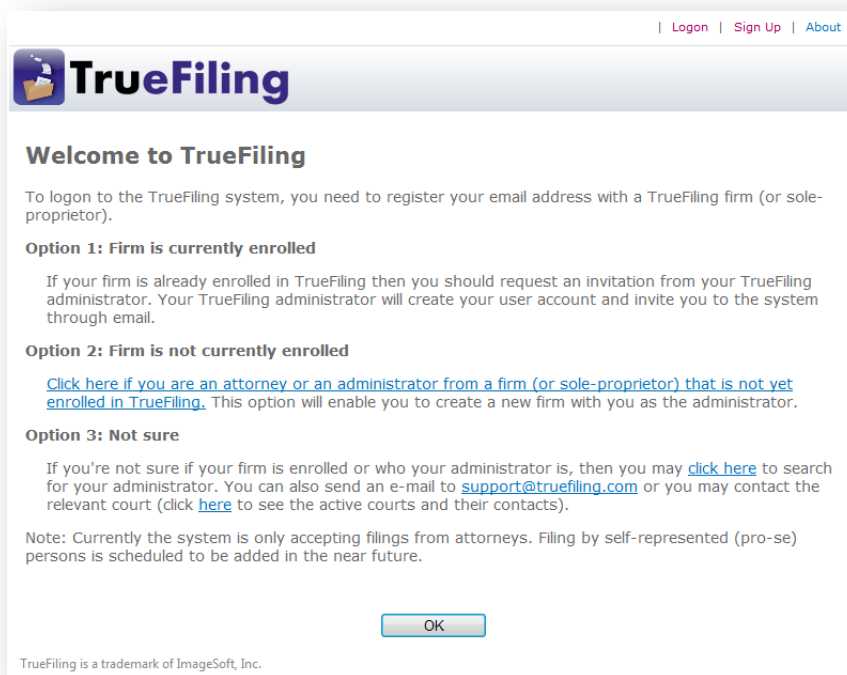
Potential administrators for new TrueFiling Law Firm Sites should determine if another member of the firm has already created a TrueFiling Law Firm Site.

To determine if your firm already has a TrueFiling Law Firm Site and a TrueFiling administrator, perform the following steps:

1. Using a modern Internet browser, navigate to <https://www.truefiling.com>. The Login page will appear.



2. Click **Sign Up**. The Sign Up page will appear listing various options on how to create an account for TrueFiling.



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**NOTE:** Please read all three options carefully before making a choice. Only choose Option 2 if you are certain nobody from your firm has ever signed up for TrueFiling.

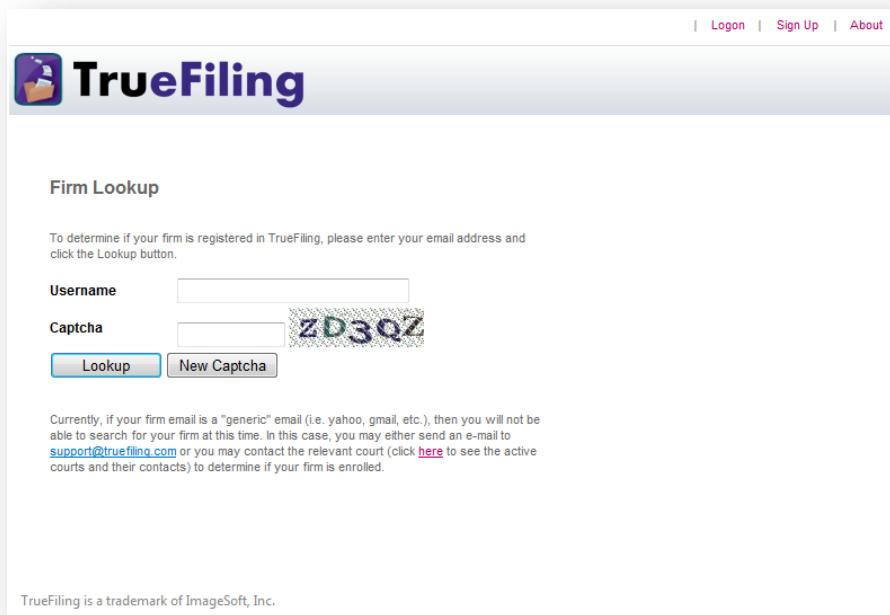
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3. Locate **Option 3: Not Sure** and find the sentence that refers to searching for your administrator.

**Option 3: Not sure**

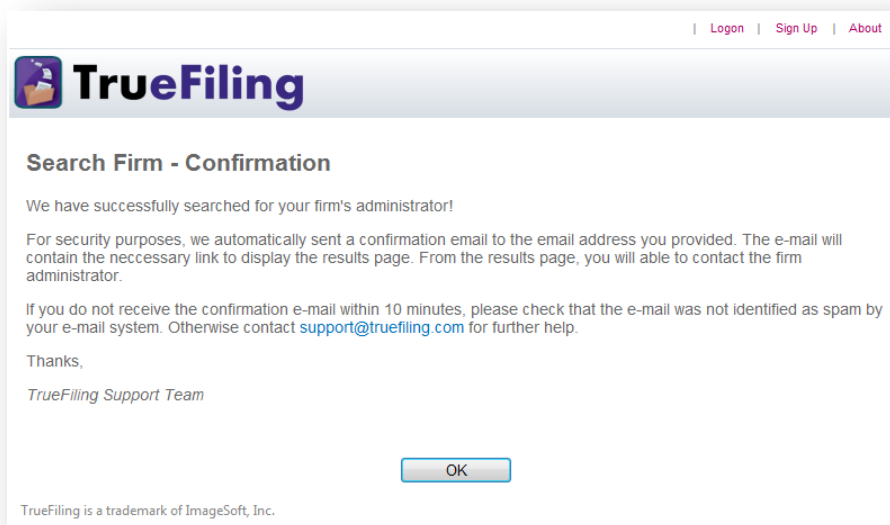
If you're not sure if your firm is enrolled or who your administrator is, then you may [click here](#) to search for your administrator. You can also send an e-mail to [support@truefiling.com](mailto:support@truefiling.com) or you may contact the relevant court (click [here](#) to see the active courts and their contacts).

4. Click the **click here** link found in the image above to open the Firm Lookup page.



The screenshot shows the TrueFiling website's 'Firm Lookup' page. At the top, there is a navigation bar with links for 'Ligon', 'Sign Up', and 'About'. The TrueFiling logo is prominently displayed. Below the logo, the heading 'Firm Lookup' is followed by a brief instruction: 'To determine if your firm is registered in TrueFiling, please enter your email address and click the Lookup button.' There are two input fields: 'Username' and 'Captcha'. The 'Captcha' field contains the characters 'ZD3QZ'. Below these fields are two buttons: 'Lookup' and 'New Captcha'. A paragraph of text explains that generic email addresses (like yahoo or gmail) are not supported for searching at this time, and provides contact information for support or court contacts. At the bottom, a small note states 'TrueFiling is a trademark of ImageSoft, Inc.'

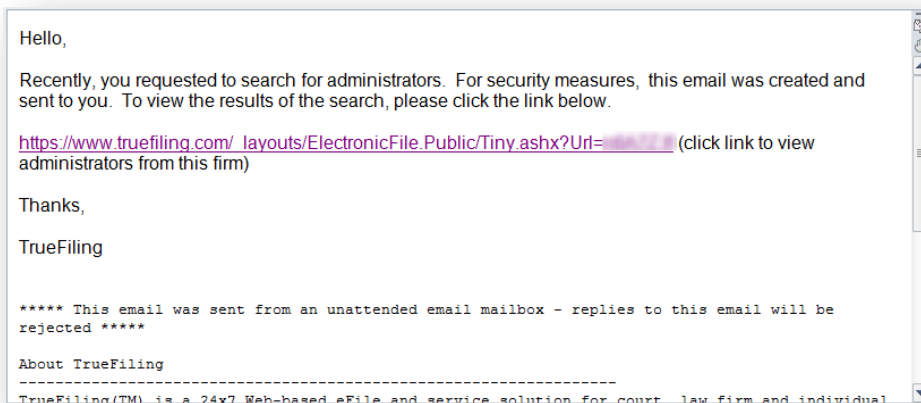
5. From the Firm Lookup page, enter your email address in **Username** and the characters shown in the **CAPTCHA** image.
6. Click **Lookup**. The Search Firm – Confirmation page will appear.



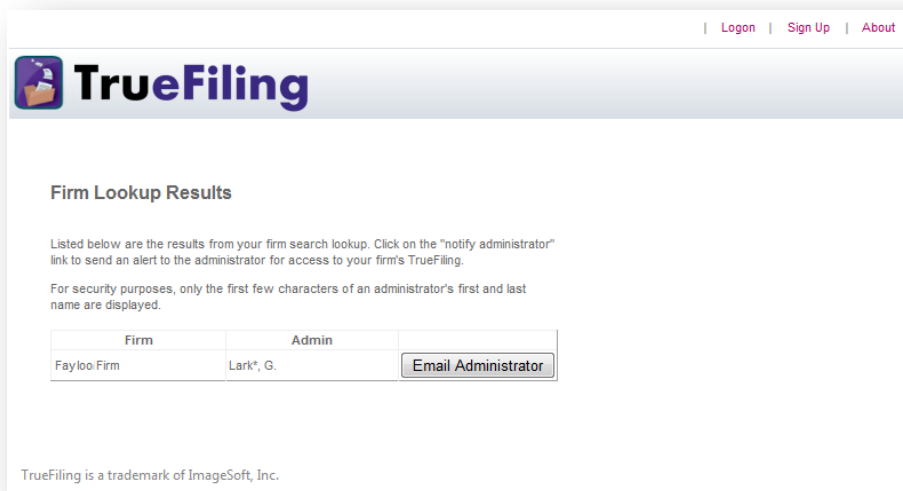
The screenshot shows the 'Search Firm - Confirmation' page on the TrueFiling website. The navigation bar at the top is identical to the previous page. The heading 'Search Firm - Confirmation' is followed by a message: 'We have successfully searched for your firm's administrator!'. Below this, a paragraph explains that a confirmation email has been sent to the provided email address, containing a link to the results page. Another paragraph advises that if the email is not received within 10 minutes, the user should check their spam folder or contact support. The message concludes with 'Thanks, TrueFiling Support Team'. At the bottom center, there is an 'OK' button. A small note at the very bottom states 'TrueFiling is a trademark of ImageSoft, Inc.'

7. You will receive an email with a link to the search results within ten minutes. The following is a sample email message showing the link to the search firm results page.

NOTE: Based on your email provider, the email may have ended up in your spam or junk folder. Check your spam filtering rules and verify the truefilingadmin@truefiling.com email is on your whitelist.



8. Click the link found in the email. The Firm Lookup Results page will appear.



9. Look for the appropriate firm in the results based on **Firm Name** and **Admin**.

NOTE: Any results in the Firm Lookup Results page means your firm is most likely already a member of TrueFiling. You should not create another TrueFiling Law Firm Site if your firm has already joined.

10. Only proceed with the next section if you are absolutely certain there are **no** potential administrators for your law firm. Instead, click the **Email Administrator** associated with your Firm Name for a potential administrator to request access.



## Creating an Administrator Account and a TrueFiling Law Firm Site

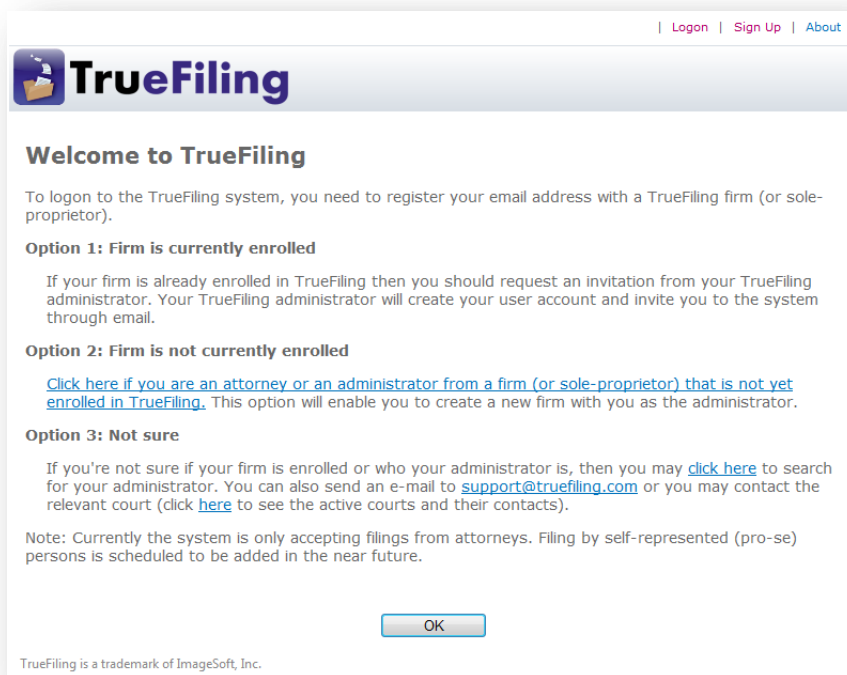
TrueFiling provides the ability for a law firm to share access to case information and filings for a firm using a single TrueFiling Law Firm Site. The TrueFiling Law Firm Site is created by a member of the firm usually denoted as the TrueFiling administrator.

NOTE: Before you attempt to create a new TrueFiling Law Firm Sites, determine if another member of the firm has already created a TrueFiling Law Firm Site using the steps defined in the previous section.

For law firms that have not created a TrueFiling Law Firm Site yet, perform the following steps:

1. Using a modern Internet browser, navigate to <https://www.truefiling.com>. The Login page will appear.

2. Click **Sign Up**. The Sign Up page will appear listing various options on how to create an account for TrueFiling.



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**NOTE:** Please read all three options carefully before making a choice. Only choose Option 2 if you are certain nobody from your firm has ever signed up for TrueFiling.

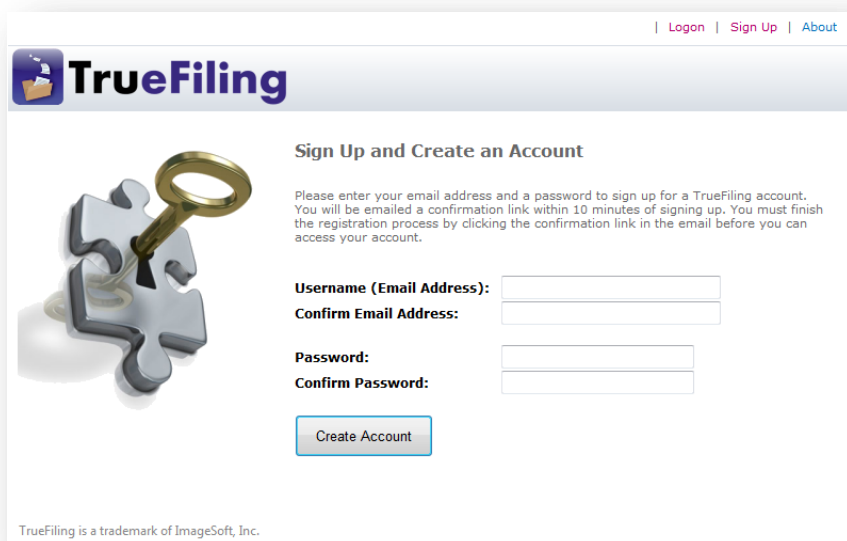
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3. Locate **Option 2: Firm is not currently enrolled.**

**Option 2: Firm is not currently enrolled**

[Click here if you are an attorney or an administrator from a firm \(or sole-proprietor\) that is not yet enrolled in TrueFiling.](#) This option will enable you to create a new firm with you as the administrator.

4. Click the **Click here if you are an attorney or an administrator from a firm that is not yet enrolled in TrueFiling** link found in the image above to open the Account Sign Up page.



The image shows a screenshot of the TrueFiling website's sign-up page. At the top, there is a navigation bar with links for 'Logon', 'Sign Up', and 'About'. The TrueFiling logo is prominently displayed on the left. To the right of the logo is a graphic of a puzzle piece with a keyhole, and a golden key is inserted into it. The main heading is 'Sign Up and Create an Account'. Below this, a paragraph explains the sign-up process: 'Please enter your email address and a password to sign up for a TrueFiling account. You will be emailed a confirmation link within 10 minutes of signing up. You must finish the registration process by clicking the confirmation link in the email before you can access your account.' The form consists of four input fields: 'Username (Email Address):', 'Confirm Email Address:', 'Password:', and 'Confirm Password:'. A 'Create Account' button is located below the password fields. At the bottom left, a small text line states 'TrueFiling is a trademark of ImageSoft, Inc.'

5. Enter your email address for **Username (Email Address)** and **Confirm Email Address**.

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**NOTE:** The email address used cannot be associated with any other TrueFiling Law Firm Site and should be the one officially used by you law firm.

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6. Enter a password for **Password** and **Confirm Password**.

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**NOTE:** The password must contain at least one non-alphanumeric character such as a punctuation symbol, a mathematical symbol, a slash or a dash.

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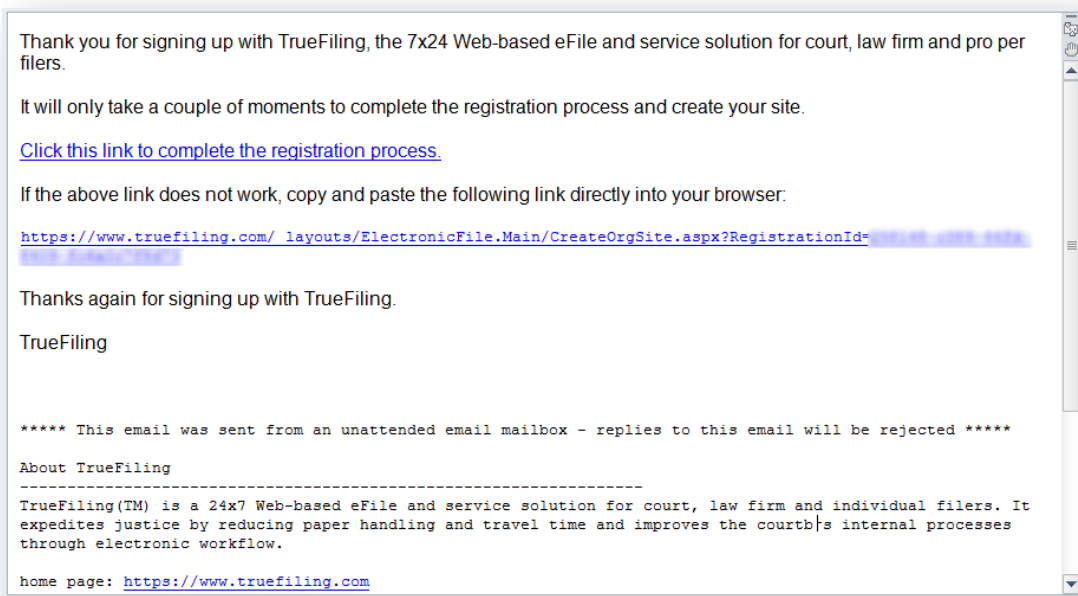
7. Click **Sign Up**. A confirmation email will be sent to the email address specified in the Account Sign Up form.

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**NOTE:** Based on your email provider, the email may have ended up in the recipient's spam or junk folder. Make sure the intended recipient checks their spam filtering rules and verify the truefilingadmin@truefiling.com email is on their whitelist.

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8. Check your inbox for a confirmation email. The following is a sample confirmation email.



9. A TrueFiling Law Firm Site is not created and you do not have access to TrueFiling until the registration process is completed. To complete the registration process, click the **Click this link to complete the registration process** link provided in the confirmation email. The Registration Confirmation and Firm Creation page will appear.



# TrueFiling



## Registration Confirmation and Firm Creation

Please enter the name of your Law Firm and your TrueFiling username (email address) and password to complete the registration process.

**Law Firm Name:**

Example: Smith and Jones Law, LLC

**Username (Email Address):**

**Password:**

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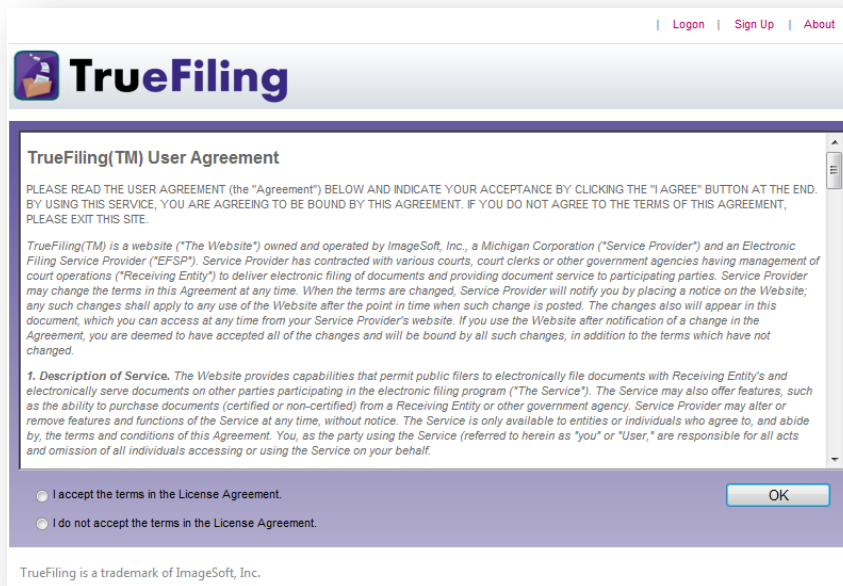
10. Verify **Username (Email Address)** is pre-populated with your email address and enter the name of your law firm for **Law Firm Name** and the password you chose during sign up for **Password**.

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**NOTE:** The **Law Firm Name** field is used during e-service and listed on the automatically generated Proof of Service filings. The value should be the same as the name of the firm used on letterheads.

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11. Click **Create Firm Site**. The End User License Agreement page will appear after creating the TrueFiling Law Firm Site.



12. Read the entire user agreement.

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**NOTE:** You will not be able to use TrueFiling unless you accept the terms in the license agreement.

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13. If you do not agree to the terms and conditions listed in the user agreement, close the browser window. Otherwise, select **I accept the terms in the License Agreement** and click **OK**. The default page for your TrueFiling Law Firm Site will appear.

The screenshot displays the TrueFiling web application interface. At the top left is the TrueFiling logo. The top right shows the firm name "Smith and Smith, LLC" with the email "smg@sampledomain.com" and a "Logoff" button. A yellow information banner at the top states: "Information: ! There are no courts currently registered as a favorite for your firm. As an administrator for this firm, click Court Lookup and add all relevant courts to your list of favorites." The left sidebar contains a menu with categories: Main Pages (eFile, My Recent Activity), Case Search (highlighted), History, Favorites, Settings, Contacts & Attorneys, Login Users, My Settings, Accounts, Resources (Quick Start Guide, User Guide, Admin Guide, FAQ, About), Training, and Online Video. The main content area is titled "Court Case Search" and includes a "Court" dropdown menu, a "Court Lookup" button, a "Case Search (Case Number, Case Description)" field with a "[Required...]" label, and two optional date filters: "Case opened on or after" and "Case opened on or before", each with an "Optional..." label and a "Search" button. Below the search fields, the "Search Results" section displays the message "There are no items to show in this view." The footer contains "Copyright © 2011" on the left and "Email Support" on the right.

**TrueFiling**

**Smith and Smith, LLC**  
smg@sampledomain.com | Logoff

**Information:** ! There are no courts currently registered as a favorite for your firm. As an administrator for this firm, click Court Lookup and add all relevant courts to your list of favorites.

**Court Case Search**

Court  
[Dropdown Menu] [Court Lookup]

Case Search (Case Number, Case Description)  
[Required...]

Case opened on or after [Optional...] Case opened on or before [Optional...]

[Search]

**Search Results**  
There are no items to show in this view.

Copyright © 2011 Email Support

## Managing Login Users

TrueFiling supports multiple users for a single TrueFiling Law Firm Site. Therefore, each member of the law firm using TrueFiling will need to be invited. Under no circumstances should members of the law firm share usernames and passwords.

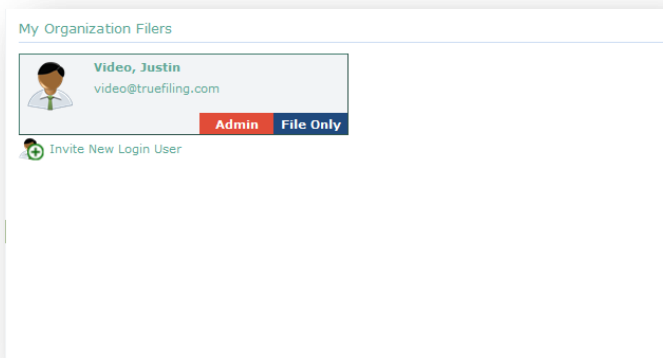
Administrators for a TrueFiling Law Firm Site manage the users who have rights to the login. Only a TrueFiling Law Firm Site administrator can invite other users to join the TrueFiling Law Firm Site.

This section provides information on how to manage login users for a TrueFiling Law Firm Site.

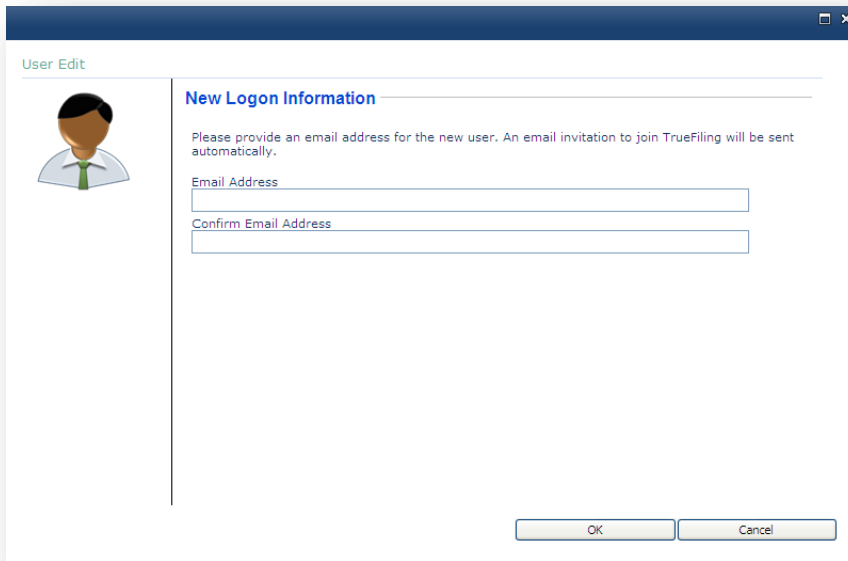
### Inviting Login Users

To invite a new user to join your TrueFiling Law Firm Site, perform the following steps:

1. Click **Login Users** from the left navigation. The My Organization Filers page will appear.



2. Click **Invite New Login User**. The User Edit dialog will appear.



The dialog box is titled "User Edit" and features a user icon on the left. The "New Logon Information" section contains a text prompt and two input fields for email addresses. At the bottom are "OK" and "Cancel" buttons.

User Edit

**New Logon Information**

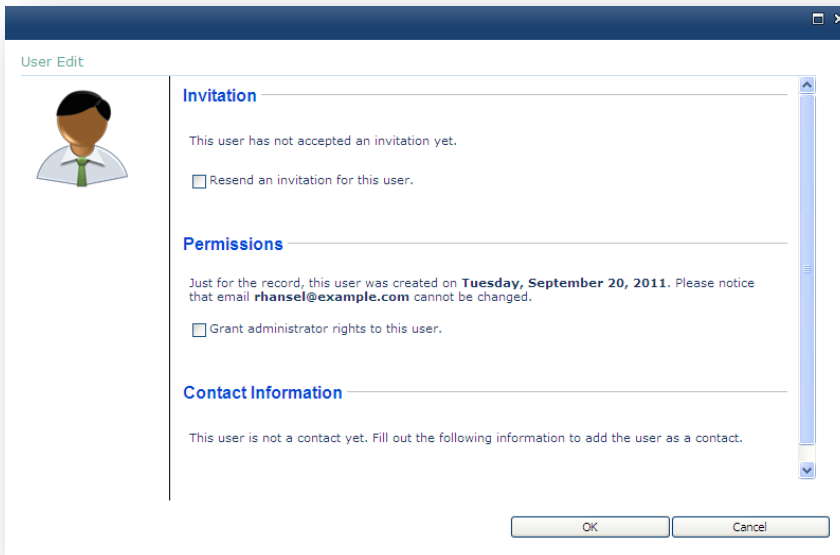
Please provide an email address for the new user. An email invitation to join TrueFiling will be sent automatically.

Email Address

Confirm Email Address

OK Cancel

3. Enter the email address for the new user in **Email Address** and **Confirm Email Address**.
4. Click **OK**. An email will be sent to the invited user based on the supplied email address and the Edit User dialog will appear.



The dialog box is titled "User Edit" and features a user icon on the left. It contains three sections: "Invitation" with a checkbox to resend an invitation, "Permissions" with a checkbox to grant administrator rights, and "Contact Information" with a text prompt. At the bottom are "OK" and "Cancel" buttons.

User Edit

**Invitation**

This user has not accepted an invitation yet.

☐ Resend an invitation for this user.

**Permissions**

Just for the record, this user was created on **Tuesday, September 20, 2011**. Please notice that email **rhansel@example.com** cannot be changed.

☐ Grant administrator rights to this user.

**Contact Information**

This user is not a contact yet. Fill out the following information to add the user as a contact.

OK Cancel

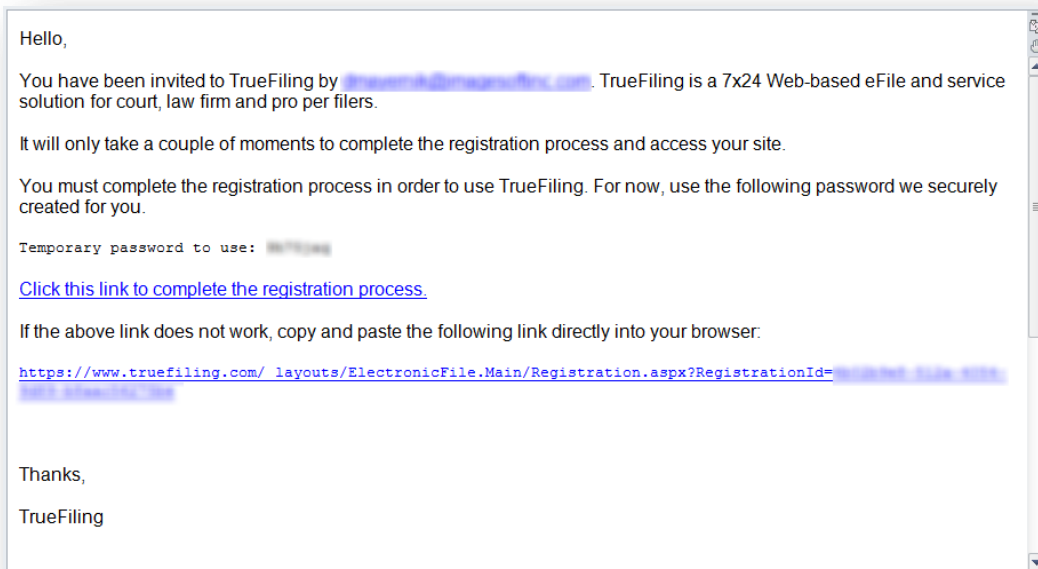
5. To promote the user to an administrator, check **Grant administrator rights to this user**.
6. Click **OK**.
7. The My Organization Filers listing will refresh.



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**NOTE:** The invited user must complete the registration process by clicking the link provided in the invitation email. The user will not have access to TrueFiling until the registration process is completed. The following is a sample invitation email.

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**NOTE:** Based on your email provider, the email may have ended up in the recipient's spam or junk folder. Make sure the intended recipient checks their spam filtering rules and verify the truefilingadmin@truefiling.com email is on their whitelist.

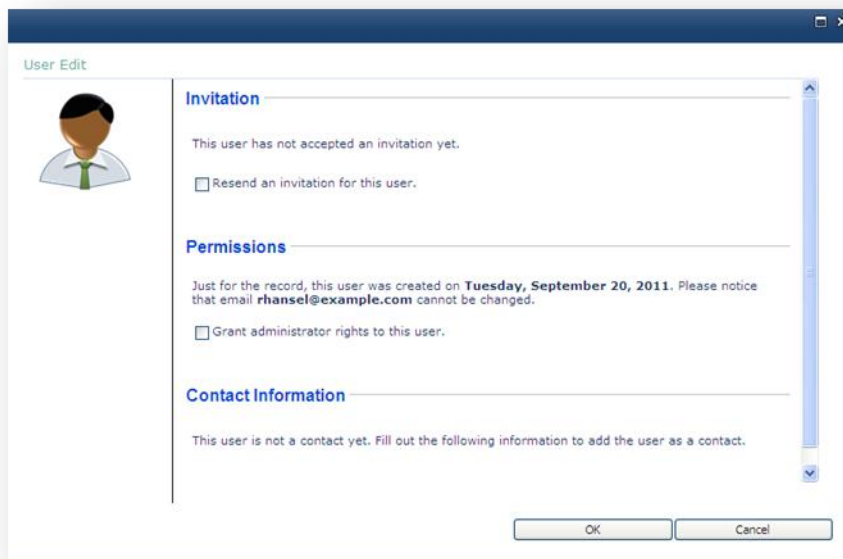
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## Ensuring an Invitation to Join a TrueFiling Firm was Accepted

TrueFiling requires all invited users to confirm the invitation request by clicking a link sent via email. When a TrueFiling administrator invites a user to join the firm, an email is automatically sent by TrueFiling containing a confirmation link and a temporary password.

To ensure an invited user completes the TrueFiling registration process:

1. Verify the user has been invited to join the firm by clicking **Login Users** from the left navigation. The My Organization Filers page will appear.
2. Look for the user you invited and click the placard to view the details. If the user has not accepted the invitation yet, the Invitation section for the User Edit dialog will appear.



The 'User Edit' dialog box is shown with a user icon on the left. The right pane has three sections: 'Invitation', 'Permissions', and 'Contact Information'. The 'Invitation' section states the user hasn't accepted an invitation and has a checkbox to 'Resend an invitation for this user.' The 'Permissions' section notes the user was created on Tuesday, September 20, 2011, and has a checkbox to 'Grant administrator rights to this user.' The 'Contact Information' section states the user is not a contact yet. At the bottom are 'OK' and 'Cancel' buttons.

User Edit

**Invitation**

This user has not accepted an invitation yet.

☐ Resend an invitation for this user.

**Permissions**

Just for the record, this user was created on **Tuesday, September 20, 2011**. Please notice that email **rhansel@example.com** cannot be changed.

☐ Grant administrator rights to this user.

**Contact Information**

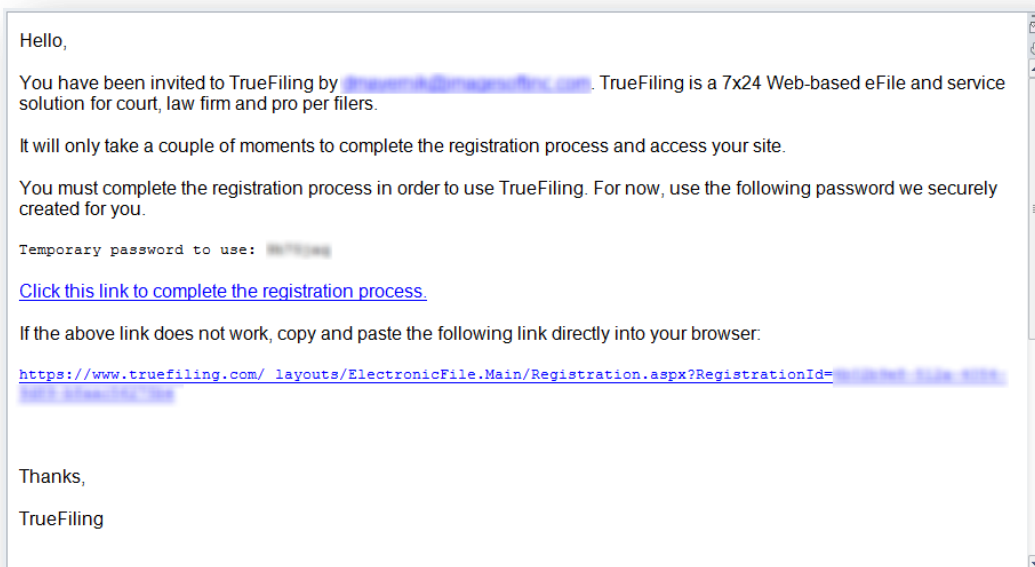
This user is not a contact yet. Fill out the following information to add the user as a contact.

OK Cancel

3. To resend an invitation email to the user, select **Resend an invitation for this user** and click **OK**.

NOTE: Based on your email provider, the email may have ended up in a spam or junk folder. Check your spam filtering rules and verify the truefilingadmin@truefiling.com email is on your whitelist.

4. Ensure the invited user checks their email for an invitation message similar to the following.



The email is an invitation to TrueFiling. It includes a greeting, an explanation of TrueFiling, a note about the registration process, a temporary password, a link to complete registration, and a direct link to the registration page. It ends with 'Thanks, TrueFiling'.

Hello,

You have been invited to TrueFiling by [rhansel@example.com](#). TrueFiling is a 7x24 Web-based eFile and service solution for court, law firm and pro per filers.

It will only take a couple of moments to complete the registration process and access your site.

You must complete the registration process in order to use TrueFiling. For now, use the following password we securely created for you.

Temporary password to use: **8675309**

[Click this link to complete the registration process.](#)

If the above link does not work, copy and paste the following link directly into your browser:

<https://www.truefiling.com/layouts/ElectronicFile.Main/Registration.aspx?RegistrationId=60606060-6060-6060-6060-606060606060>

Thanks,  
TrueFiling

5. The invited user must click the **Click this link to complete the registration process** link and follow the required steps to complete the registration process.

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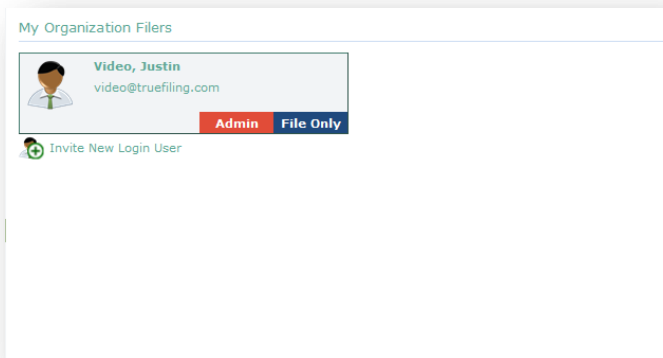
NOTE: Resending an invitation will invalidate all prior confirmation links. Specifically, every re-invitation request will generate a new temporary password and invitation code.

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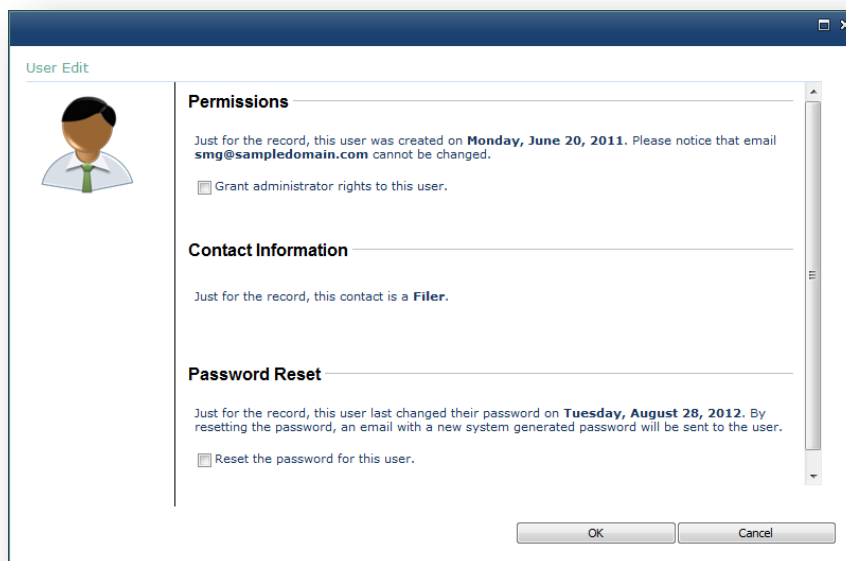
## Resetting a Login User Password

To reset the password for a user, perform the following steps:

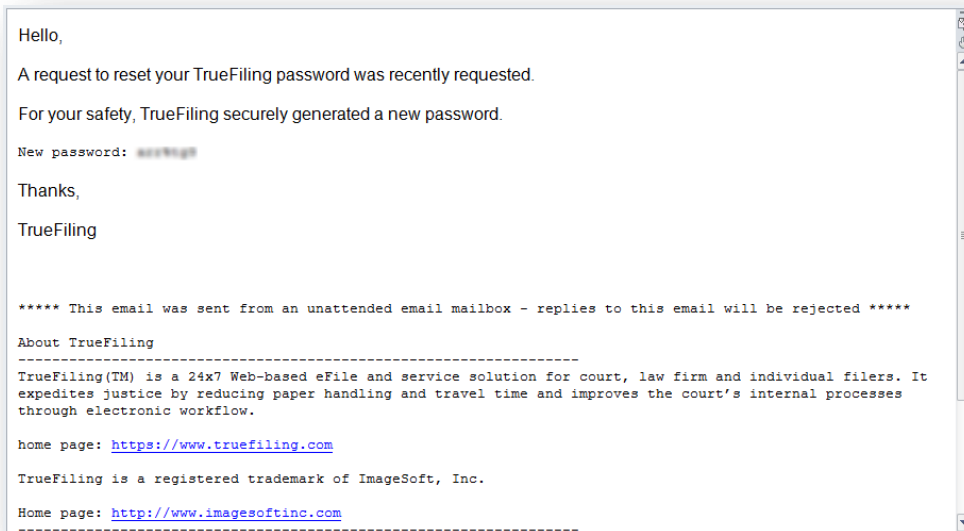
1. Click **Login Users** from the left navigation. The My Organization Filers page will appear.



2. Click the placard for the appropriate user. The User Edit dialog will appear.



3. From the **Reset Password** section, verify **Reset the password for this user** is selected.
4. Click **OK**. The User Edit dialog will close and the user will be emailed a new, system-generated, password. The following is a sample password reset email.



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**NOTE:** Based on your email provider, the email may have ended up in the recipient's spam or junk folder. Make sure the intended recipient checks their spam filtering rules and verify the truefilingadmin@truefiling.com email is on their whitelist.

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## Managing Favorite Courts

TrueFiling allows law firms to electronically file and serve documents to multiple courts using a single TrueFiling Law Firm Site. A firm administrator must associate the relevant courts with the TrueFiling Law Firm Site. Although non-administrator login users for the firm can electronically file against cases for a firm associated to the TrueFiling Law Firm Site, they are not able to create a court association.

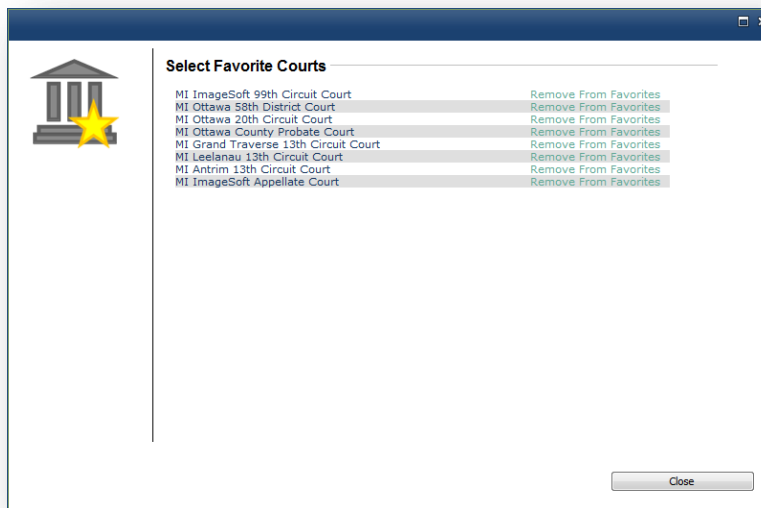
### Adding a Court to Favorites

To add a court to the favorites, perform the following steps:

1. Using a modern Internet browser, logon to TrueFiling and click **Case Search** from the left navigation under **Main Pages**. The Court Case Search page will appear.

**NOTE:** The **Court Lookup** button is only available to TrueFiling Law Firm Administrators. If the button does not appear on the Case Search page, contact your firm's administrator.

2. From the Court Case Search page, click **Court Lookup**. The Select Favorite Courts dialog will appear.



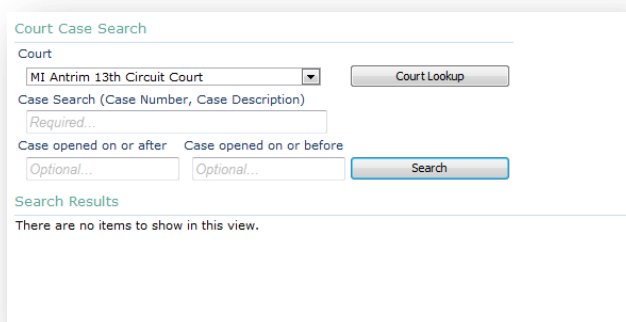
3. Click **Add to Favorites** to add a court to your firm's favorites. Click **Remove from Favorites** to remove the court from your firm's favorites.
4. Click **Close** when you are done managing the list of favorite courts.

## Removing Courts from Favorites

NOTE: Court Favorites are for the entire firm. Removing a court from the list of favorites will affect all users for the TrueFiling Law Firm Site.

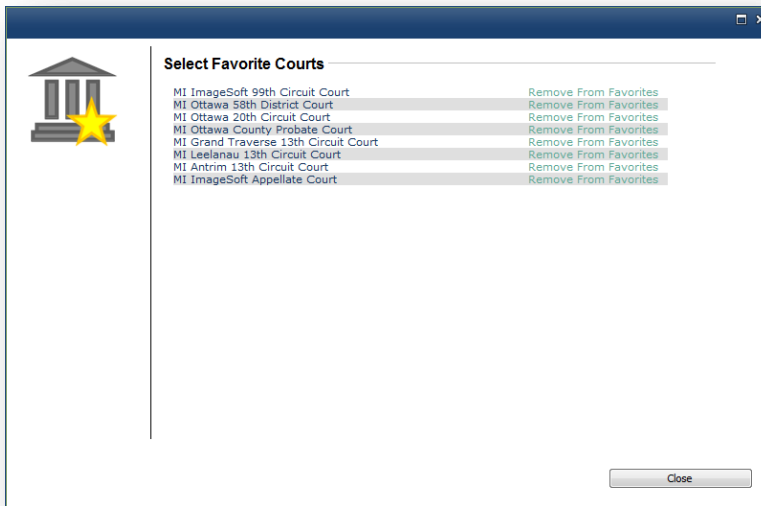
To remove a court from the favorites, perform the following steps:

1. Using a modern Internet browser, logon to TrueFiling and click **Case Search** from the left navigation under **Main Pages**. The Court Case Search page will appear.



NOTE: The **Court Lookup** button is only available to TrueFiling Law Firm Administrators. If the button does not appear on the Case Search page, contact your firm's administrator.

2. From the Court Case Search page, click **Court Lookup**. The Select Favorite Courts dialog will appear.



3. Click **Remove from Favorites** to remove the court from your firm's favorites. Click **Add to Favorites** to add a court to your firm's favorites.
4. Click **Close** when you are done managing the list of favorite courts.

## Managing Payment Accounts

TrueFiling allows law firms to securely store payment accounts for use by all filers of the TrueFiling Law Firm Site. Although non-administrator login users can create payment accounts for the firm, TrueFiling recommends administrators maintain the list of available payment accounts for the TrueFiling Law Firm Site.

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NOTE: Payment accounts are managed at for the entire TrueFiling Law Firm Site. Therefore, all payment accounts are available to be used by any filer for the firm.

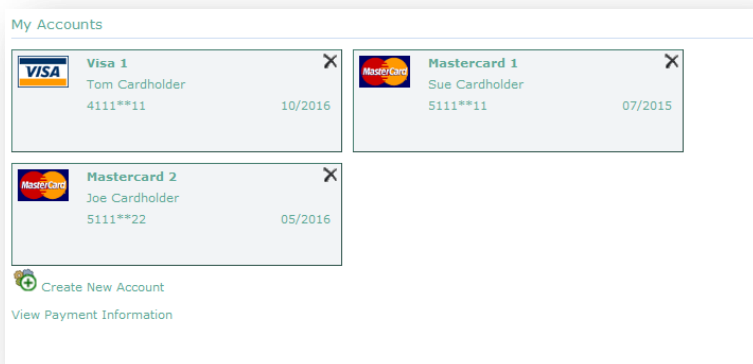
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TrueFiling supports Visa, MasterCard and American Express as valid types of payment accounts.

### Adding a Payment Account

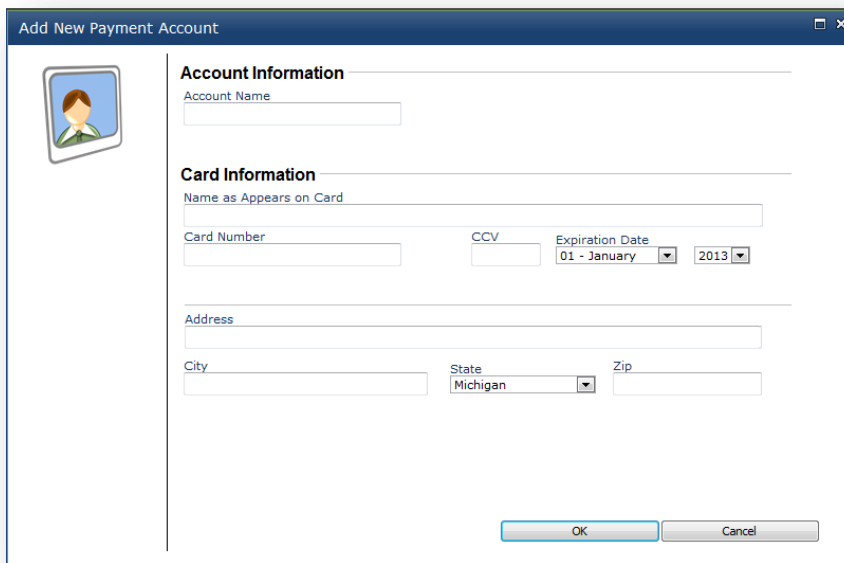
To add a new credit card account, perform the following steps:

1. Click **Accounts** from the left navigation under **Settings**. The My Accounts page will appear.



2. Click **Create New Account**. The Add New Payment Account dialog will appear.





**Add New Payment Account**

**Account Information**

Account Name

**Card Information**

Name as Appears on Card

Card Number CCV Expiration Date

01 - January 2013

Address

City State Zip

Michigan

OK Cancel

3. Enter a name for the account as **Account Name**.
4. Enter all of the credit card information including **Name as Appears on Card, Card Number, CCV, Expiration Date, Address, City, State and Zip**.
5. Click **OK**. The Credit card will be validated for accuracy before being added as an account. The My Accounts listing will refresh.

## Modify a Payment Account

To edit a credit card payment account, perform the following steps:

1. Click **Accounts** from the left navigation under **Settings**. The My Accounts page will appear.
2. Click on the associated payment account placard. The Edit Payment Account dialog will display.

**Edit Payment Account**

**Account Information**

Account Name  
Mastercard 1

**Card Information**

Name as Appears on Card  
Sue Cardholder

Card Number  
5111\*\*11

Expiration Date  
10 - October 2012

**Address**

Address  
123 Green

City  
Detroit

State  
Michigan

Zip  
48033

OK Cancel

3. Modify the specific credit card information and click **OK**. The Credit card will be validated for accuracy before being added as an account. The My Accounts listing will refresh.

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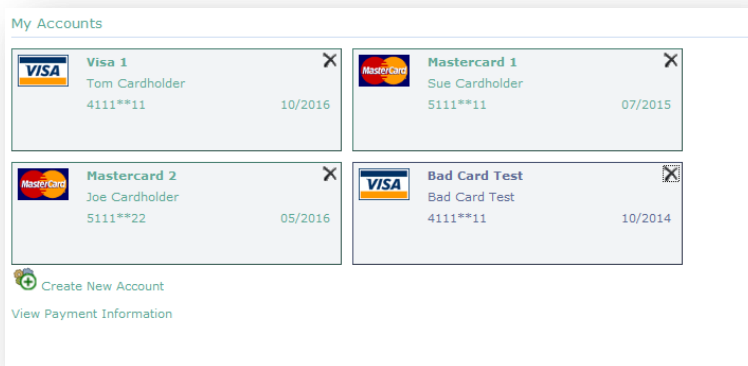
NOTE: Account Name and Card Number are read only and cannot be changed.

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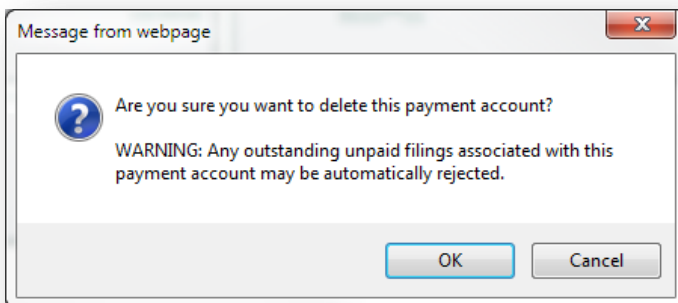
## Removing a Payment Account

To add remove a credit card account, perform the following steps:

1. Click **Accounts** from the left navigation under **Settings**. The My Accounts page will appear.



- Click the **X** icon for the associated card. The following confirmation prompt will appear.



- Click **OK** to delete the payment account.

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**NOTE:** Any outstanding unpaid filings associated with the deleted payment account may be automatically rejected. Only delete payment accounts when you are sure all filings have been paid or in the case of an emergency such as a stolen card or a closed account.

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- The My Accounts listing will refresh.